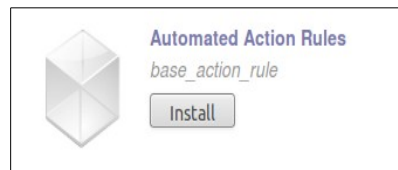
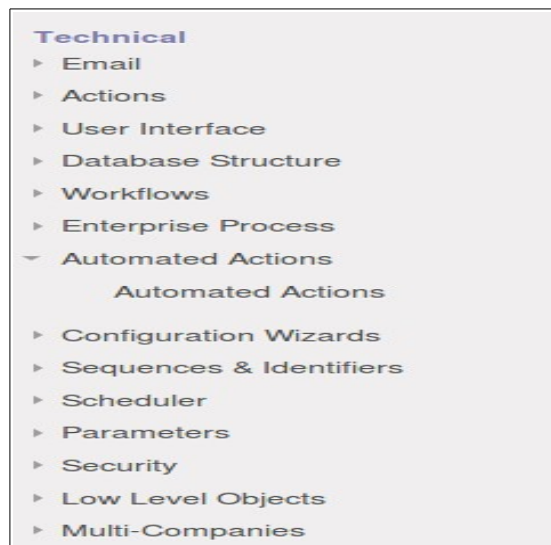


Automated Action Rule for Project Issue

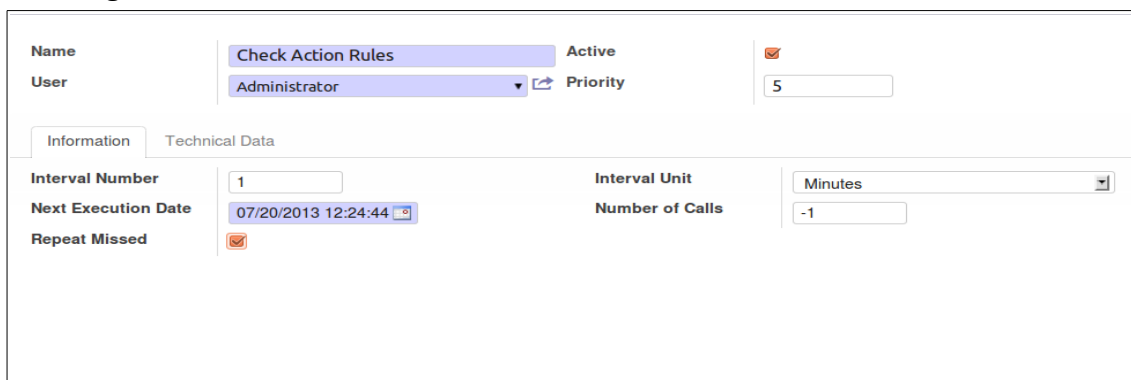
- OpenERP's Automated Actions is a module usually Associated with CRM modules, allowing to automate sales process steps, without the need to write Python code.
- For create any Action rules you must have the module “Automated Action Rules” display as following:



- Now if the user have “Technical Features ” access right that he/she can see the menu of “Automated Action” from Setting > Technical > Automated Action as following:



- Now user also configure the the scheduler named “Check Action Rules” via Setting > Technical > Scheduler.

A screenshot of the OpenERP Scheduler configuration form for a scheduler named "Check Action Rules". The form is divided into "Information" and "Technical Data" tabs. Under "Information", the "Name" is "Check Action Rules", "User" is "Administrator", "Active" is checked, and "Priority" is "5". Under "Technical Data", "Interval Number" is "1", "Interval Unit" is "Minutes", "Next Execution Date" is "07/20/2013 12:24:44", "Number of Calls" is "-1", and "Repeat Missed" is checked.

- In this scheduler user can add the “Next Execution Date” after which he/she want to call “Automated Action Rules”.
- User can mention Interval unit for after which interval he/she want to call this scheduler.
- “Number of Calls” is for How many times the scheduler is called, the negative number indicates no limit.
- “Repeat Missed” is specify if the missed occurrences should be executed after server restart.

Automated Action Rule for Project Issue

- Now lets see an “Automated Action” for “**Project Issue**”.
- Here first of all, we create an “Automated Action” for “Project Issue Creation”, in which an auto Reminder(Email) is sent to the user(who Created the Project Issue) if any Project Issue is Created.

Rule Name
Project Issue Created.

Related Document Model | **Project Issue** | Active | Sequence | 4

Conditions | Actions

Filter Condition

Before Update Filter | [] | Trigger Date | Creation Date |

After Update Filter | **Project Issue** | Delay After Trigger Date | 1 | Minutes

Select a filter or a timer as condition.
An action rule is checked when you create or modify the "Related Document Model". The precondition filter is checked right before the modification while the postcondition filter is checked after the modification. A precondition filter will therefore not work during a creation.
To create a new filter:
- Go to your "Related Document Model" page and set the filter parameters in the "Search" view (Example of filter based on Leads/Opportunities: Creation Date "is equal to" 01/01/2012)
- In this same "Search" view, select the menu "Save Current Filter", enter the name (Ex: Create the 01/01/2012) and add the option "Share with all users"
The filter must therefore be available in this page.

- **Field Description:**

- **Rule Name:** Name of Rule. (User can give any name as required)
- **Related Document Model:** Model to which the action rule is related with(Here we create an action rule for Project Issue so related document model is “Project Issue”).
- **Active:** When unchecked the Rule is hidden and will not be executed.
- **Condition:**
 - **Before Update Filter:** Here if any filter is present, this condition must be satisfied before the update of the record.
 - **After Update Filter:** If any filter is present, this condition must be satisfied after the update of the record.

Open: After Update Filter

Filter Name | **Project Issue** | User | Administrator |

Model | **Project Issue** | Default filter |

Domain | `[(state, '=', 'draft')]`

Context | `{}`

Save or Discard

- **Trigger Date:** Date on which the rule will trigger.(Here Date or datetime fields of “Related Document Model” will be in the selection)
- **Delay After Trigger Date:** Delay after the trigger date.You can put a negative number if you need a delay before the trigger date, like sending a reminder 15 minutes before a meeting.

Automated Action Rule for Project Issue

Rule Name
Project Issue Created.

Related Document Model | Project Issue | Active | Sequence |

Conditions | **Actions**

Fields to Change
Set Responsible | | Add Followers |

Server actions to run

or

Sequence	Action Name	Action Type
5	Project Issue Created	Email <input type="button" value="X"/>

- **Field Description:**

- **Action:** Here Action will be defined.
 - **Set Responsible:** If user want to add responsible user for this action.
 - **Add Followers:** If user want to add Auto Followers for for perticular Model.
 - **Server actions to run:** Here user can add multiple actions. We create a following action for our need.

Open: Server Actions

Action Name | Project Issue Created | Condition | True

Object | Project Issue | Sequence | 5

Action Type | Email

Email Configuration

Email Address | [[object.create_id.email]]

Subject | PROJECT [[object.project_id.name]] ISSUE [[object.name]] Created.

Message | Hello,
This issue for [[object.partner_id.name]] (Customer Code [[object.partner_id.id]]) is Successfully Created and the state is changed to [[object.state.upper()]]:

Details:
| Issue Code : [[object.id]]
| Summary : [[object.name]]
| Project Code : [[object.project_id.id or ""]]
| Project Name : [[object.project_id.name]]

Access all the fields related to the current object using expressions, i.e. object.partner_id.name

ir.actions.server

or

- **Action Name:** Name of Action.
 - **Condition:** Condition that will be tested before action is executed and prevent execution if it is not verified.
 - **Object:** related Model for Action.
 - **Action Type:** Which type of action do you want to executed. (Here we want email action).
 - **Email Address:** Email address of any user/ partener.
 - **Subject:** Subject of Email.
 - **Message:** Body of Email.

Automated Action Rule for Project Issue

- Now save the Automated Action.
 - Now this action will be called automatically if any Project Issue is Created.
- In the same way we can create an Automated Action for Project Issue, in which an auto Reminder(Email) is sent to the user(who Created the Project Issue) if any Project Issue is changed to Opened State.

Rule Name
Project Issue Opened.

Related Document Model | **Project Issue** | Active |
Sequence |

Conditions | Actions

Filter Condition | **Timer**

Before Update Filter | | Trigger Date | | |

After Update Filter | **Project Issue Opened.** | Delay After Trigger Date

Select a filter or a timer as condition.
An action rule is checked when you create or modify the "Related Document Model". The precondition filter is checked right before the modification while the postcondition filter is checked after the modification. A precondition filter will therefore not work during a creation.
To create a new filter:
- Go to your "Related Document Model" page and set the filter parameters in the "Search" view (Example of filter based on Leads/Opportunities: Creation Date "is equal to" 01/01/2012)
- In this same "Search" view, select the menu "Save Current Filter", enter the name (Ex: Create the 01/01/2012) and add the option "Share with all users"
The filter must therefore be available in this page.

- The only Changes to do are in Filter Domain and Trigger Date as compared to Automated Action created for creation of Project Issue.

Open: After Update Filter

Filter Name | **Project Issue Opened.** | User |

Model | **Project Issue** | Default filter |

Domain | **[('state','=', 'open')]**

Context | {}

or

Automated Action Rule for Project Issue

- The **Server actions to run** for Project Issue open.

Open: Server Actions

Action Name Project Issue Opened **Condition** True

Object Project Issue **Sequence** 5

Action Type Email

Email Configuration

Email Address [[object.create_id.email]]

Subject PROJECT [[object.project_id.name]] ISSUE [[object.name]] is Opened.

Message
Hello,
This issue for [[object.partner_id.name]] (Customer Code [[object.partner_id.id]]) is now Opened and the state is changed to [[object.state.upper()]]:

Details:
| Issue Code : [[object.id]]
| Summary : [[object.name]]
| Project Code : [[object.project_id.id or ""]]
| Project Name : [[object.project_id.name]]

Access all the fields related to the current object using expressions, i.e. object.partner_id.name
ir.actions.server

Save or **Discard**

- In this way we can also create an “Automated Action” for Project Issue Pending, Done or Cancelled.
- For this we need to change Filter Domain, Trigger Date and Server actions to run as required as compared to Automated Action created for creation of Project Issue.

Rule Name
Project Issue Pending.

Related Document Model Project Issue **Active**
Sequence 7

Conditions Actions

Filter Condition **Timer**

Before Update Filter **Trigger Date** Update Date

After Update Filter Project Issue Pending **Delay After Trigger Date** 1 Minutes

Select a filter or a timer as condition.
An action rule is checked when you create or modify the "Related Document Model". The precondition filter is checked right before the modification while the postcondition filter is checked after the modification. A precondition filter will therefore not work during a creation.
To create a new filter:
- Go to your "Related Document Model" page and set the filter parameters in the "Search" view (Example of filter based on Leads/Opportunities: Creation Date "is equal to" 01/01/2012)
- In this same "Search" view, select the menu "Save Current Filter", enter the name (Ex: Create the 01/01/2012) and add the option "Share with all users"
The filter must therefore be available in this page.

Automated Action Rule for Project Issue

- Here “After update Filter- Domain” for different states are as following:
 - Pending : [('state','=','pending')]
 - Done : [('state','=','done')]
 - Cancelled : [('state','=','cancelled')]
- Trigger Date will be same as “Update Date”.
- Server actions to run is as user required.
- So in this way these Actions will be called if any Project issue's state changes.